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3 ADR LUNCHTIME SERIES

4 Conflict Management for Teams

5 Cheryl Caldwell, Program Manager,

6 U.S. Geological Survey, Collaborative

7 Action and Dispute Resolution Office

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14 TRANSCRIPT OF Interactive Session in the

15 above-entitled cause, on April 7, 2009, at the

16 hour of 12:00 p.m., EDT.

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22 TRANSCRIBED BY: Janet L. Clark, FPR

1 STEPHANIE: I think we'll get started.

2 It's a minute or so after noon. We have
3 people on the telephone who come in at
4 noontime.

5 So good afternoon and welcome to the
6 monthly ADR lunchtime series sponsored by the
7 interagency ADR working group, Workplace
8 Conflict Management Section. We're very
9 happy to have you here with us today in the
10 room. We'd also like to welcome our
11 telephone participants. My name is Stephanie
12 Sell (phonetic). I'm an ADR attorney at
13 FEMA. I'm actually filling in for my
14 supervisor, Cynthia Mazer (phonetic). Cindy
15 is the ADR Director at FEMA. She is also the
16 Chair of the Workplace Conflict Management
17 Section.

18 Before we get started, I'd just like
19 to thank many of the people who are
20 responsible for these monthly programs. Pam
21 Pontillo, from the Department of Energy's
22 Office of Dispute Resolution. She hosts us.

1 She handles us. She does basically the
2 lion's share of the work on all arrangements
3 and logistics. We thank her for that. Kathy
4 Binder is the Director of that office. We
5 thank her for hosting us also. Nice to have
6 us here. Rod Ismay (phonetic) and Sylvia
7 Covington were the people who checked you in.

8 And just another sort of housekeeping
9 item, we have the people participating by
10 telephone, and it's a listen-only call. We
11 ask you please to mute your telephone during
12 the conference call. If you're call doesn't
13 have a mute button, please call from a quiet
14 place. And avoid using the keyboard.
15 Another point is to please not put your
16 telephone on hold because the hold music or
17 the hold message could interfere with the
18 call for others. So it's very important. If
19 you have to leave the call, just hang up and
20 call back in, please.

21 For people present here in the room,
22 because we have this telephone audience and

1 we're recording the program through the
2 telephone line, we're going to ask you to use
3 these microphones for question and answers or
4 comments. Pam and I will hand out the
5 microphone. Cheryl, sometimes it's nice if
6 you can repeat it or just make sure everybody
7 heard the question.

8 Then we always like to preview what's
9 coming after this program. Next month on May
10 7th there is a flier on the table. It's a
11 program called, Literature and History.
12 Drawing excellence from past and present
13 books on ADR. That features three ADR
14 practitioners and authors, Jerome Barrett,
15 Jeff Sanger, and John Settle. That's May
16 7th. We ask if you have any other
17 suggestions for topics or speakers to please
18 communicate with us by e-mail or here. We're
19 really open to your suggestions.

20 Now, today we have a wonderful
21 speaker and a great topic, I think. It's
22 Conflict Management for Teams. Our presenter

1 here is Cheryl Caldwell. Cheryl is the
2 Program Manager for United States Geological
3 Survey, Office of Collaborative Action and
4 Dispute Resolution in Reston, Virginia.
5 Cheryl is a skilled mediator, facilitator and
6 coach and has extensive experience
7 encouraging collaborative conversations with
8 teams and workgroups. Cheryl is also an avid
9 traveler and garden lover. She lives with
10 her family in Northern Virginia. Now I will
11 turn our program over to Cheryl.

12 CHERYL CALDWELL: Good afternoon,
13 everyone. I hope this is coming through. (No
14 audio). Good afternoon, everyone. I hope
15 you're picking it up. But I want to thank
16 you all for giving me the time this (no
17 audio) little bit more about (no audio).

18 AUDIENCE MEMBER: Your microphone is not
19 actually hooked up to you.

20 CHERYL CALDWELL: Oh, my goodness.
21 Thank you. I've been dragging the floor.

22 Good afternoon, everyone that's on

1 the telephone lines. I'm sure you can hear
2 me a lot better now.

3 What I'd like to do is just share
4 with you a little of the techniques that we
5 have found very useful at USGS when we worked
6 with various teams. We have teams that are
7 relatively new that are coming together that
8 may be having some little dynamic issues. We
9 have teams that have been together for a very
10 long time and they need something to help
11 reenergize them to help them refocus. So
12 what we have done is just look at (no audio)
13 do have those meetings with them so that
14 they're energized and charged up.

15 I just want to take a quick canvas of
16 the audience here. How many of you actually
17 have had some experience working with work
18 groups or teams? Any of you? Okay. So
19 you -- one of things you'll probably agree
20 with me on is that teams change. They're
21 ever evolving. The dynamics may have worked
22 really well for one group, may change for

1 another group. So the value of having a lot
2 of different tools in your toolbox when
3 you're getting ready to work with a group are
4 invaluable. What I'm going to do is kind of
5 go through some of the strategies that we
6 have found very useful. I'm going to invite
7 you to engage, since we have an intimate
8 audience here, to please jump in and engage.
9 If you have any strategies that you have used
10 that you have found to be very successful, I
11 want to hear about those. We want to hear
12 about this to make this exchange. I don't
13 present myself to you today as the expert.
14 But through a lot of trial and error, and I
15 mean a lot of trial and error, we have seemed
16 to have come across a few techniques that
17 work very effectively.

18 So today, one of the objectives --
19 one of the objectives for the session would
20 be to -- we're going to try to make this a
21 little experiential where I'm going to give
22 you a little taste of some of the things that

1 we do so you can actually get a little
2 hands-on. For those of you who are in the
3 listening audience, if there is a way that
4 you can, you know, practice this amongst
5 yourselves, you'll probably get a little bit
6 more out of it. As well hoping that you will
7 at least have a little bit of tools, some
8 skills, some ideas, some energy around
9 possibilities of designing a conflict
10 intervention session when you're tasked to do
11 so.

12 One of the things that I think we
13 have found very important when we begin to
14 work with teams is the biggest thing is
15 allowing time. When you're working with
16 groups and teams, time is essential that you
17 allow them enough time to plan, to prepare,
18 to engage. I can't tell you how many times
19 we'll get a phone call where someone will say
20 hey, you know, we just want a little
21 training. Can you come over here like today,
22 this afternoon, and work with us? That's

1 trial and error number one. I went with a
2 disaster. Preparation, I learned was very,
3 very important. The other part is if you
4 can -- I don't know how you're structured --
5 work with a co-facilitator. If you have
6 someone that has the time, mutual interest,
7 and expertise, you will find the energy of
8 the group will stay balanced and even elevate
9 when you have a co-facilitator who is helping
10 you plan and prepare. It also helps you to
11 hear possibly some of the concerns or thrust
12 of the groups that you may alone omit.

13 Another area that is important as you
14 begin to work more and more with teams is to
15 practice. We have been exposed to so many
16 different tools and different instruments,
17 different scenarios where it can be very
18 beneficial with teams and allowing yourself
19 the time to practice and not being -- taking
20 the risk to use some of these tools. You'll
21 find them very useful when you're really
22 actually doing a session.

1 Lastly, one of the things that we, my
2 colleague and I, found very useful is to
3 create a little scrapbook or notebook. We
4 keep agendas that worked really well. We
5 look at different instruments and tools that
6 we have found that worked really well for a
7 different group. It allows us to have the
8 flexibility that we need, but it also allows
9 us to keep a record of successes and areas
10 that we want to improve. Okay.

11 One of the things when you begin to
12 work with teams or groups, that we'd like to
13 encourage you, really have a little
14 facilitation skills. Facilitation skills are
15 invaluable when you're working with work
16 groups. You may have your agenda or an idea,
17 a plan of how you're going to interact. But
18 you will find that groups are ever-changing,
19 they're ever-evolving. Being able to
20 facilitate the energy, facilitating what's
21 most important to them is one thing that
22 you'll find very valuable.

1 The next piece is learning how to use
2 the remote. Once you learn how to master
3 that, you do a lot of great things. The
4 second piece is training. Adult learning
5 styles is another skill that's very
6 available. When you're dealing with adult
7 learners, something about being engaging,
8 being interactive, having people move around,
9 having it visual, having it sensory-oriented,
10 you tend to have a group be more involved in
11 the problem-solving. This is, I found, even
12 more valuable for groups who are really at
13 high levels of tension. Just being able to
14 appeal to them in a way that they can step
15 back but yet still be engaging is very
16 valuable in a team interaction. Group
17 dynamics, having a little insight of where
18 the groups are.

19 Stages. Is this a new group? Is
20 this an existing group? Is this a group
21 where they've had changes? Maybe the
22 leadership has changed. Maybe the

1 participants of that particular team or group
2 has changed. Just having a little
3 understanding of group dynamics. Are they
4 forming? Are they stormy? Are they
5 (indiscernible). Just a little insight will
6 help you when you begin to draft an agenda
7 and engage an activity for them.

8 Most important, consult with the
9 participants and your clients. When I use
10 the term client, I'm talking about the person
11 who may have invited you to work with the
12 work team. Find out some of the history,
13 some of the things that the team is involved
14 in. What is their mission? What are their
15 projects? How do they typically work? What
16 are -- who are their cooperators? Talk to
17 the participants. Find out from them a
18 little bit about their energy. What's most
19 important to them? Where are some of
20 the challenges are that they see from their
21 perspective.

22 Lastly, the ability to be flexible.

1 I can't tell you how important it is to be
2 flexible so that you're moving with the group
3 in the direction that they need to go in.

4 The next area that we talk about are
5 these steps that I'll go through in detail.
6 But the value of pre-work and preparation;
7 the value of building a framework for the
8 group; the value of gaining some team
9 insight, as well as vision; and setting them
10 up so that they can have the meetings that
11 they need to have so they can have those
12 difficult conversations or they can begin to
13 build strategies to improve what -- you know,
14 what initially got you invited to facilitate.
15 And then set them up in a way that they can
16 evaluate team success.

17 Now, through this conversation I know
18 I've used two words very interchangeably. I
19 want to know if you-all are clear on them.
20 That's the word group and team. Does anyone
21 know what the differences are and why we
22 delineate the two? When we look at a

1 workgroup, a workgroup typically has a
2 leader. They may be independent in their
3 function but they have a leader. And they
4 are considered -- their accountability is
5 based on what their independent function may
6 bring to the table. So that's a workgroup.
7 An example of that could be my office. I'll
8 use my office. I work within the Ethics
9 Office. We're part of HR. My function as
10 ethics functions are totally different;
11 however, we work for one leader. And the
12 goal is to provide excellent customer
13 service, so we do have a commonality;
14 however, there is difference. When we look
15 at a team, teams have mutual accountability.
16 They are all -- they may have different
17 skills and expertise. But when they come
18 together, the product is a mutual
19 accountability. It's not just one leader or
20 one person. It really is about the team
21 functioning, the team operating together, the
22 team cohesion. One of the things that we

1 found that when we are working with our
2 different teams or groups is that there are
3 some groups that are being charged to move as
4 a team. They wonder, what is the disconnect?
5 Why is this so difficult? You know, why
6 can't we come together? I think as
7 facilitators it's important to find out how
8 they are actually structured, how they
9 actually work. Are they really in a format
10 to be a successful team? It will make a
11 difference in how you coach them. Many times
12 when we look at workgroups, some of the
13 things that may be important to them is
14 communication. Making sure that
15 communication is effective, that everyone is
16 being heard and valued. When you work with a
17 team, it may be more so, how are we going to
18 measure our success? How are we going to
19 make sure we're moving forward in mutual
20 goals? So the energy may be just a little
21 different. However, once you have clarity in
22 that and can help them have clarity in how

1 they can be successful and still have
2 collaborations, it helps the team move
3 forward even more.

4 Let's start with pre-work. Pre-work.
5 I really believe this is the most important
6 part of the session. That is the time that
7 you spend preparing. When we look at
8 pre-work, we're looking at everything. You
9 know, the conversations that you need to have
10 with your clients and participants, finding
11 out what's going on, what success looks like
12 for them, what do they expect from their
13 particular retreat or team intervention.
14 This is also a real good time -- especially
15 when teams are really at a high level of
16 conflict, if you have individuals who are
17 upset, you can provide them the opportunity
18 to speak with you individually or participate
19 in maybe a paper or Internet-type survey to
20 vent what some of those concerns are. What
21 that allows you to do is to kind of coach
22 them so they can understand how this process

1 will work, as well as you'll hear their
2 concerns. And when they come into the
3 conflicted team setting, they're ready to do
4 some work. They're not there to vent. It
5 helps move people forward.

6 Using a survey, when you're working
7 with maybe a large office or a larger team,
8 where doing individual work, even if you do
9 have a code, it's not really practical, these
10 are just two. I mean, I'm not really an
11 advocate for either one or the other but
12 they're great. They're great surveys. You
13 can create questions. They actually help you
14 develop and design questions that you can
15 send to the group. Send it ahead of time.
16 You'll be surprised of the kind of feedback
17 and insights that you get from these
18 particular instruments that will help you
19 prepare.

20 We typically like to use, where
21 appropriate, assessment tools. The reason
22 why we use these assessment tools is because

1 they're great. They're great little
2 icebreakers for individuals, as well as it
3 helps them gain some kind of insight about
4 themselves and others. When you the agenda
5 planning and development, it's helpful if you
6 have like a day-and-a-half session that you
7 really know how you're allocating the time.
8 So when you do your draft agendas, try to get
9 a gauge of how much time you believe each
10 block or each section that you want to invite
11 the group to do will take. That will just,
12 again, help you be more effective at
13 facilitating the process and allowing the
14 energies of the group.

15 The other thing is building a
16 framework. How many of you are familiar with
17 the ground rules? When you started the
18 group, you asked them, do you want to
19 establish ground rules? Has anybody had any
20 resistance to that for the groups?
21 Somebody's like, ground rules, here we go.
22 First of all, we're not really welcome when

1 we come in for some conflict management for
2 teams, so we try to make sure that we're very
3 careful with the language that we use. What
4 we found to be more successful is attaching
5 the ground rules to the guiding principles of
6 the agency. Every agency has a guiding
7 principle or mission or something that gives
8 its employees some energy. I did not put
9 this in your handouts, but USGS has a guiding
10 principle. Our guiding principles basically
11 talk about being respectful, being
12 accountable, communicate, value differences,
13 encourage, focus, and collaborate. I think
14 most federal agencies have something very
15 similar to this. What we have found is that
16 we bring in the guiding principles to the
17 groups. We ask them to define these
18 particular points the way that they feel as
19 though it needs to be defined. Then we ask
20 them to share what that behavior would be
21 demonstrated during this meeting.

22 This creates a lot of beginnings for

1 you. One, you'll be able to observe how your
2 teams are interacting with each other because
3 at this point you'll stand back. Two,
4 they'll begin to delve very deeply into some
5 of the issues that may be touching around
6 these areas, whether it be communicate or
7 value differences. They'll be able to
8 interpret this in their own area, and it
9 helps them to begin to take ownership on the
10 outcomes of the meeting.

11 I'm just going to ask you-all just
12 for one minute. I'm going to read these
13 through again. I'm going to ask you to pick
14 one. Just jot down what we call like a
15 silent brainstorming on your sheet and what
16 that means to you and what behavior you would
17 like to see demonstrated.

18 Again, they are be respectful, be
19 accountable, communicate, value differences,
20 encourage, focus, collaborate. Just take
21 about one minute and jot down one, what that
22 means to you, one of those words. And then

1 two, what is the behavior.

2 Again, that's be respectful -- pick
3 one -- be accountable, communicate, value
4 differences, encourage, focus, collaborate.
5 Okay. I'm going to ask somebody to give me
6 one they have. Who took communicate? How
7 about I just pass the mic around and you can
8 just tell me what you have.

9 AUDIENCE MEMBER: I had value
10 differences. Next to it I have everyone
11 brings different skills to the table, and we
12 have to acknowledge those skills. If I, as
13 part of a team, don't have the skill, then I
14 should talk to you about how I can sharpen
15 that skill and make it better.

16 CHERYL CALDWELL: Excellent. Excellent.
17 So value differences and how you can connect
18 with your team members to sharpen skills.
19 Give me another one. Who has another one?

20 AUDIENCE MEMBER: I chose be
21 accountable. I think to introduce it to the
22 group as taking charge of their decisions and

1 following through on them. Being responsible
2 for their decisions and their actions once
3 they choose to act on them.

4 CHERYL CALDWELL: So being accountable,
5 taking responsibility for your actions and
6 your decisions. Let's just take one more.

7 AUDIENCE MEMBER: I also picked
8 accountable. A little bit different
9 perspective on it. To focus on the results
10 that we want, not on the results that we
11 don't want. And help each other respectfully
12 to achieve those results.

13 CHERYL CALDWELL: Excellent. So
14 focusing on the results that we want and not
15 what you don't want. Focus on what you want
16 more of.

17 Hopefully, you're getting a taste of
18 how when you begin to build the framework for
19 the group, when you tie in guiding principles
20 to the ground rules and the behaviors, it
21 really sets the tone for a conversation that
22 is more in-depth.

1 So many times when people come to
2 these type of forums, they're already tiffed.
3 They're already uptight. Some of them dread
4 coming in. They want to call in sick and not
5 show up at all. When you give them a little
6 foundation that we can all connect to and all
7 relate to without insulting anyone, it seems
8 to be more engaging and you have more buy-in.

9 The other part is talk about
10 decisions. The best way to make a decision
11 is -- one of the things that we like to do is
12 help our groups along and tell them this
13 early on is that we're going to encourage
14 consistence-building. Everyone familiar with
15 the thumbs up, thumbs down, thumbs over? We
16 encourage this particular model. We say if
17 you're in agreement and the group can move
18 forward, raise your thumb up. If you're in
19 disagreement, raise -- put your thumb down.
20 The commitment that the group has to make is
21 that if someone has the thumb down that
22 you're going to give them the floor. You're

1 going to give them the space to say what they
2 need to say so they can at least raise it to
3 the (indiscernible), which means they can
4 live with it. We encourage that level of
5 involvement and engagement. It's amazing how
6 people just feel "I just want to be heard.
7 If you could just hear what I have to say or
8 what I have to contribute to this team. If
9 you allow me the opportunity. If you allow
10 me to bring in more information, maybe I can
11 just get to the point where I can live with
12 it." That, again, helps to move a team
13 forward.

14 Lastly, it's important to ask the
15 team again, you know, you've done your
16 individual interviews but just have them
17 reiterate what their expectations are. What
18 is it that you want as an outcome of our
19 meeting today? What is it that's most
20 important to you? At one o'clock when we end
21 this session, what is it that you want to
22 take away? So when you're meeting with your

1 groups, it's real important to be able to
2 give them -- have them attached to something
3 so that they can have something that they can
4 take away with, so you're clear on what those
5 particular objectives are.

6 Right now if I were to ask you, when
7 this session ends today, what is the takeaway
8 that you want to have? What would you tell
9 me?

10 AUDIENCE MEMBER: I guess what I want to
11 take away is -- I want to take from this is
12 some of the tools and techniques to use as
13 far as conflict management.

14 CHERYL CALDWELL: Okay. That is
15 important. Tools and techniques. One of the
16 takeaways so you have another clarity.
17 Anybody else? What are some of the takeaways
18 you want to have at the end of this session?

19 AUDIENCE MEMBER: Some things to avoid.

20 CHERYL CALDWELL: Some things to avoid.
21 Again, when you're looking at building a
22 framework, it's real important to reconnect

1 to what's important with your audience so
2 that as you're developing your conflict
3 management tools or when you're developing
4 your agenda, you can make sure that you can
5 add these points in. That's most important.
6 Hopefully, we'll do just that.

7 Gaining insight. This is another
8 piece that we think is important to
9 incorporate when you're meeting with groups.
10 We do this in many different ways. There is
11 a high variety of different tools that you
12 can use that can help you gain more insight.
13 One of the tools that we have used very
14 frequently, we use the DISC, the personal
15 discernment inventory. We use the
16 Myers-Briggs. We use a team-effectiveness
17 profile.

18 I had a gentleman who contacted me.
19 I don't want to say his name wrong. He, too,
20 has developed a great tool that encourages
21 diversity that's very similar to the Thomas
22 Kilmann. Become familiar with different

1 tools and instruments. Some of them require
2 certification or credentialing before you
3 administer them. There's quite a few that
4 are out there that do not require that. It
5 just requires you the ability to read and
6 comprehend and apply. So I encourage you to
7 look at how you can use these various tools
8 and incorporate them in your session. Most
9 of these tools come with little mini sessions
10 so that your audience can really gain some
11 more insight as far as how that works.

12 One of the tools that we use that our
13 Conflict Management for Teams was
14 really based on. We started out with a DISC.
15 A colleague prior to me would do a DISC
16 workshop. We had teams who were having
17 difficulties. And through that DISC
18 workshop, they began to have insights and be
19 able to have conversations that were very
20 difficult but that before they could not
21 have. So we decided that it's really
22 important to try to incorporate these mini

1 enlightenment sessions.

2 What you'll find out, you'll find out
3 the different work styles. You'll find out
4 preferences as far as the styles of work, the
5 styles of communication. You'll find out how
6 decisions are made. You know, you'll have
7 some people who will come into this room, for
8 example, and recognize the color, the texture
9 of the wall. They'll recognize the floor.
10 They'll recognize the smell. Then you'll
11 have some people who make, you know, the only
12 thing they need for collecting information is
13 just the ambiance of the environment. It's
14 real important to understand what those
15 differences are. Introduce them to your
16 group and help them gain insight. This
17 allows them for a real important piece in the
18 process of gaining personal insight, gaining
19 insight on their team and being able to get a
20 picture of your strengths and the areas that
21 they may need to be more mindful of. So
22 using a mini session is invaluable.

1 The next piece is visioning. How
2 many of you are familiar with appreciative
3 inquiry? Has anybody -- great. Great. One
4 of the things that we have found -- I went to
5 a session not too long ago about appreciative
6 inquiry. I was just fascinated by it. I
7 said, I'm going to attempt to introduce this
8 concept to our audiences in just a slight
9 way. Typically, when we were working with
10 teams that were in conflict or groups that
11 were in conflict, it was so easy to use the
12 old format. Okay. Let's identify the
13 problem. What is the problem? What are the
14 barriers? What are these things that are
15 making it difficult? And begin to focus more
16 and spend more energy on the negative versus
17 taking them to where they want to be.

18 So what we begin to do is just
19 ever-so-slightly look at how to help the team
20 members envision what they want. Envision
21 when it was great when you worked as a team
22 and everything was going very well. What was

1 that like? What were some of the components
2 that were there? What were some of the key
3 traits that were there? What are some of the
4 things that even your team is doing now that
5 you did when you were working with this
6 highly-effective functioning team? What
7 you're doing is, one, helping them create
8 what they want more of, getting that vision
9 in their head; two, you're helping them to
10 celebrate their successes. Many times teams
11 feel as though, you know, we didn't do this.
12 Our leadership is disappointed. This, that,
13 and the other. They're supposed to be
14 focusing on the things that may not be
15 working. Still, it's important to recognize
16 their successes and the things that they are
17 doing well, the accomplishments they are
18 making in addition to what they want more of.

19 Some of the visioning questions that
20 we begin to ask our groups when they get
21 together are, for example, now I ask you,
22 recall a time when you participated in an

1 effective breakthrough or when collaboration
2 was at its best. Think about that. And then
3 think about what were the elements that paved
4 the way for the success? What was there that
5 made this collaborative so successful, so
6 energetic, so engaging? Who was involved?
7 What resources were there? Then think --
8 knowing what you know now and where you are
9 with your group, what are some of the core
10 factors? What were some of the core factors?
11 Think about those. Again, when you think
12 about your team at its best, what are some of
13 those things that they're doing that make
14 them successful? What more can your team
15 foster to make these behaviors the norm?

16 Again, we found in this particular
17 piece when you're looking at visioning and
18 helping your team begin to move forward from
19 wherever it is the disconnect is, it's so
20 important to have those powerful questions.
21 Sometimes it's just about putting the
22 questions there and allowing them a framework

1 to begin to answer them. Now, we do this in
2 many different ways, and that will go to the
3 next piece, but we look at using the
4 facilitation skills and tools to help you
5 have these questions. Help them to begin to
6 let this information settle in. It's amazing
7 when you have people visioning. They're so
8 busy stressing about what doesn't work, they
9 forget that it can work. We have worked
10 together before. And you kind of take them
11 away from the negative and move them more so
12 to where they want to be. It's a subtle
13 process. We have had people say, well, we
14 are not getting to what we came here for.
15 You're giving us this vision pie. We're not
16 getting what we came here for. So we asked
17 them, what is it that you want? Well, you
18 know, we don't communicate. So and so
19 doesn't listen. Blah, blah, blah, blah. We
20 asked them the question, well, tell me what
21 you want it to look like. Kind of help them
22 reframe that question. By doing that they're

1 able to get a vision and then they're able to
2 build a strategy of how to move forward.
3 It's real important that when we use these
4 visioning components, we'd look at different
5 strategies to help them. But ultimately, we
6 want to bring them to a format to have the
7 meeting.

8 From the things that I shared with
9 you from the beginning from the writing
10 principles that are established, grounds
11 rules, from getting the clear expectation of
12 what's most important to the group, from
13 being able to get some insights, you're
14 putting them in a position where now they're
15 ready to begin to engage each other. They're
16 ready to have the conversations that they
17 need to have. We look at doing that with
18 some of the visions that they came up with.
19 We look at what it was that they wanted to
20 have more of. That is the strategy that we
21 use. There's a term that we -- that I
22 learned from Coach U. It's one of the

1 coaching programs called Gap Bridging. And
2 it's basically taking what you want from
3 where you are and looking at how you can get
4 to where you want to be. So gradually we
5 will have this group begin to brainstorm and
6 use different activities to get them there.

7 One of the ones we'll start with is
8 the gallery walk. How many of you are
9 familiar with the gallery walk? Basically,
10 the gallery walk is where you take an idea,
11 and you may post it on the wall. So say the
12 groups came with about five or six ideas that
13 they wanted to envision. We will take each
14 concept and post it on the wall. We will
15 allow them, maybe during a break or during a
16 time where they're just coming back from
17 lunch, just go around and put their comments.
18 What this does it invites groups --
19 individuals who are pretty quiet who may not
20 want to really engage or be upfront at the
21 top of the room to think, to process, to
22 contribute. Many times with groups we'll

1 have something called roles and
2 responsibilities where that's something
3 that's not quite clear. Roles and
4 responsibilities and expectations. So we'll
5 invite the individuals for this particular
6 team to write down who are they? What do
7 they bring to the table? And have the other
8 team members go around and write what those
9 expectations are. So it's a way of keeping
10 your group moving. Again, we're dealing with
11 adult learners. It's a way of keeping them
12 moving, keeping them engaged, keeping them
13 thinking. We think better on our feet. We
14 think better when we're energized. We think
15 better when we're seeing something from
16 another individual so we kind of stack. It's
17 more of a stacking relationship. If you say
18 an idea, it may prompt me to think of an
19 idea. We allow them to, once again, to just
20 kind of walk around the room.

21 Another exercise that we found very
22 useful was the clock appointment. This one

1 was very good for people who work in teams.
2 Are you-all in offices that your primary
3 communication is by e-mail? It's kind of
4 bad. My boss is like right around the
5 corner. I will send her an e-mail in a
6 heartbeat, and say hey, blah, blah, blah. It
7 just becomes so common now that we're just so
8 busy. Once we get in our chairs, we don't
9 want to get up necessarily and engage. But
10 it's important to encourage that face-to-face
11 with teams.

12 What we do with the clock appointment
13 exercise, based on some of the conversations
14 that the group has brought to us, based on
15 some decisions, we invite them to schedule
16 appointments with everybody that's a part of
17 their team. We invite them to schedule these
18 appointments. Invite them to have that
19 conversation about whatever the topic may be
20 so that they can begin engaging each other
21 one on one. As facilitators, we'll go around
22 the room and watch them.

1 What I want you to do, take a moment.
2 I want you to draw a clock on a piece of
3 paper. Just draw a clock. I want to ask you
4 to ask the person to the right of you to be
5 your one o'clock appointment. Just write
6 down one o'clock and get their name. I want
7 you to ask the person behind you, if there is
8 a person behind you, to be your two o'clock.
9 So get their names. You may have to turn a
10 little bit. Okay. So you should have a one
11 o'clock and two o'clock. Let's find one
12 more. Ask the person to the left of you or
13 just find another person to be your three
14 o'clock. Get their name. Now you should
15 have a one o'clock, a two o'clock and a three
16 o'clock. Hopefully, I'll be your two
17 o'clock, sir.

18 So hopefully you get the gist of how
19 this works. You get a one o'clock, two
20 o'clock and three o'clock. This is what I'm
21 going to ask you to do. If I could just get
22 your attention. Ever so quietly reach over

1 to your one o'clock, and this is the
2 conversation you're going to have. Based on
3 some of the things that I've learned today,
4 how can I apply it? Based on some of the
5 things that you may have learned today, how
6 are you going to apply it? Just have that
7 conversation just for a one-minute
8 conversation. Based on what I learned today,
9 how am I going to apply it? I think your one
10 o'clock is -- based on what I learned today,
11 how am I going to apply it?

12 (Pause while audience complies with
13 instruction.)

14 CHERYL CALDWELL: I'm going to ask you
15 to stop with your one o'clock. I'm going to
16 ask you very quickly to have that same
17 conversation with your two o'clock. This
18 time ask what additional resources are you
19 going to need. So talk to your two o'clock.
20 What additional resources are you going to
21 need?

22 (Short pause.)

1 CHERYL CALDWELL: Okay. I'm going to
2 have you come back to me right now. Can I
3 get your attention, please? Great
4 conversation. People on the telephone want
5 to hear some of the conversations that you
6 had. I want you to come back to me. What
7 did you observe happening when we did this?
8 I observed a couple of things from being up
9 here. What were some of the observations
10 when you were able to make an appointment and
11 talk to one of your colleagues? What
12 happened?

13 AUDIENCE MEMBER: Well, they were
14 probably a little bit more open to the
15 conversation because they knew you were
16 coming. So they had already thought about
17 how to carry that conversation between.

18 CHERYL CALDWELL: Exactly. They knew
19 you were coming. They were more open. They
20 were prepared for you. What else?

21 AUDIENCE MEMBER: I think people tend to
22 share more information than they would

1 otherwise.

2 CHERYL CALDWELL: It seems like it's a
3 little bit safer to share more information.
4 A little bit more intimate to have a
5 dialogue. Is there one more?

6 AUDIENCE MEMBER: You have an
7 opportunity to course-correct if you can see
8 someone's facial expression and see how
9 whatever you say is being received. You can
10 fix it if it's not being received the way you
11 want it.

12 CHERYL CALDWELL: I like that
13 terminology. You're able to course-correct.
14 You're able to read the body language, to fix
15 it, to confirm, or gain better understanding
16 and insight. This is exactly what happens in
17 the team. When you allow them that time to
18 engage each other one on one, to schedule an
19 appointment to have a conversation, whether
20 it's one that helps them more to focus on the
21 vision or how to better engage each other.
22 Because sometimes in teams you have

1 individuals who really just don't get along
2 for whatever reason. If you give them a
3 format, if you give them more of a road map
4 of how the conversation is going to take them
5 to purpose and the outcome, it's a surprise
6 how people who could be polarized in the
7 day-to-day operations; but when it comes to a
8 joint vision or a project, how they can work
9 together. Those are the strengths that you
10 want to bring up.

11 So using this particular activity, we
12 find it to be really useful when we want
13 people to talk to each other. We want to
14 generate ideas. We want to get them engaged.

15 The last one is more so of an open
16 forum, and that's the talking stick. Anyone
17 familiar with that? You pretty much have
18 done that with the mic. Where you pass the
19 stick and whoever has the stick, has the
20 floor. Sometimes we encourage that
21 conversation even more so where you know the
22 stick is coming so you need to say something.

1 Don't leave this meeting feeling as though
2 that you weren't able to give your input.
3 The stick has come your way. So what it does
4 again is encourage those who may not
5 necessarily step up or be very
6 confrontational in a particular forum to say
7 their peace, to be considered and heard. So
8 we like using -- these are just a few
9 examples of some of the things that you will
10 learn.

11 There is a book. Again, there is a
12 lot of books I want to make sure -- I don't
13 want to put on display or any particular one.
14 It's called Facilitation with Ease by Ingrid
15 Bens. That's a -- out of all the other ones
16 that she's been the author to, that book we
17 find to be amazing. There is another one
18 called Great Meeting. And I think of the
19 authors of that but Great Meeting. For those
20 of you who are listening on the telephone, as
21 well as those of you who are here, if you're
22 interested in getting some different

1 materials that we have used, I will be glad
2 to send you a little list, as well as if you
3 have something to share with me, I'll be glad
4 to accept it.

5 AUDIENCE MEMBER: Who is the author of
6 the first book?

7 CHERYL CALDWELL: Bens. Ingrid Bens.
8 She has a little pocketbook, a little teeny,
9 weeny one, as well as there is a big one that
10 has a CD-ROM on it that you can actually load
11 on your computer. I have a colleague. She
12 tickles me. But she says, you know what?
13 When I get stuck in my groups, I take this
14 and I go into the restroom and flip through
15 it. And that's like my private consultation
16 to find what can help work. I think it's
17 just important for you to have different
18 tools such as these in your toolbox so
19 depending on your group, depending on the
20 energy, that you can help them have a
21 conversation.

22 I work with a group of scientists so

1 they're not really into the cutesy fun, you
2 know, kind of a thing. So these are things
3 that we have found that work for them because
4 it helps them generate energy. Also it also
5 has a way of lightening the mood. It
6 lightens the mood so they can step back and
7 step forward with some really clear ideas and
8 suggestions. So one of the things that I
9 found with some of those materials is that
10 there are great different ideas, different
11 dynamics that you can introduce to groups to
12 make them very successful.

13 When we look at facilitating next
14 steps and after, you know, actions, one of
15 the things that we want to do is begin to
16 formulate a commitment. Many times with our
17 groups they'll go through these particular
18 activities to build their teams, to help have
19 a difficult conversation. They have these
20 difficult conversations. They generate ideas
21 and suggestions and begin to look at how they
22 can make their visions tangible. It's

1 important to put it in a form of an
2 agreement. When we did the guiding
3 principles, for example, some of those
4 behaviors, some of those things that we said
5 were real important when we engaged each
6 other. We want to put that in the agreement.
7 When we talk about our vision and some of the
8 things that we want to have put in place,
9 some of the ideas and concepts and
10 commitments, we want to put that in the
11 agreement. It's important at this point that
12 you use your facilitation tools to make this
13 even more tangible, more concrete. If one of
14 the things that you came up with was, you
15 know, I'm going to meet with the supervisor,
16 you know, once a week. It's important to
17 begin to say, "starting with." How are you
18 going to set that up? How are you going to
19 know that you are making this measurable and
20 accountable? So it's important to take these
21 actions a little bit further. One of the
22 things that I asked you to do when you were

1 talking amongst your group is to think of
2 some of the things that you learned and how
3 you were going to use them and what resources
4 you need. I'm going to ask a volunteer, if I
5 could, to just share what they came up with.
6 Does anybody have one to share of what their
7 learnings are and what they -- resources that
8 they needed to take away? Can I ask my
9 partner if she would share hers? I thought
10 yours was good.

11 AUDIENCE MEMBER: I said that I can take
12 away the appreciative inquiry, like, the
13 positivity of instead of looking at the
14 negativity, why something had broken down
15 that instead we should -- taking a group or
16 even in your personal life, if you're having
17 personal problems, looking where you want to
18 go, like, the goals that you want to have. I
19 think the things that I would need is if I'm
20 in the group or even outside the group is the
21 ability to look at it in a positive light and
22 not get so bogged down and see it in the

1 negative light.

2 CHERYL CALDWELL: So my question for you
3 is, how would you begin to look at that in
4 the positive? What would you need to help
5 you begin to look at that in the positive?

6 AUDIENCE MEMBER: I'd need to know what
7 the goals were. Then I'd need to be able to
8 brainstorm how to get to those goals.

9 CHERYL CALDWELL: So you need to know
10 what the goals were and how to brainstorm to
11 get to those goals. How much time or what is
12 the timeframe that you need to explore that
13 further? What would those time parameters
14 be?

15 AUDIENCE MEMBER: It would depend on
16 each individual situation. I may need a
17 significant amount of time. I may need just
18 a little bit -- just the ability to stop what
19 I'm doing and say no. I want to look at the
20 positive goals in where I want to go instead
21 of where I've already been.

22 CHERYL CALDWELL: Okay. So is that

1 something you think you can do within the
2 next 30 days is to begin to do the stop.

3 AUDIENCE MEMBER: Yes.

4 CHERYL CALDWELL: So in the next 30 days
5 you're going to do a stop, begin to
6 reevaluate your goals, and then you're going
7 to be able to report back to the group? Is
8 that something that you would be willing to
9 do?

10 AUDIENCE MEMBER: Yes.

11 CHERYL CALDWELL: So as you can see,
12 there's just like this little bit of an
13 exchange to help make it more tangible, help
14 make it more doable. There's probably many
15 more questions we probably could have asked.
16 Kind of rushed my partner on a little bit,
17 but there's probably many more questions that
18 you can ask to help them begin to take it
19 from a concept to a tangible to something
20 that they can measure and evaluate. That's
21 something that's real important when you
22 begin to work with teams. And then to get

1 that team signature. That's a person's
2 personal integrity. When you usually have a
3 team member's commit to signing, you can
4 really count on that they're going to make
5 their best effort to make that work.

6 Lastly, we look at evaluating team
7 success. That's a real important component.
8 I had -- I was talking to Stephanie I think a
9 little bit earlier. One of the things that
10 happens is that when a team leaves one of
11 these meetings, typically they're energized.
12 They've got ideas. They're feeling somewhat
13 better. Maybe not 100 percent. But they
14 feel as though they at least have a beginning
15 of how they can have future conversations,
16 build future strategies. They have a little
17 framework or foundation. But one of the
18 things that's real important to leave a team
19 with is the importance of evaluating the
20 process. If after 30 days, you see that it's
21 not working or if after 30 days you see that
22 there's still disconnect or difficulties,

1 what are you going to do? What are the
2 strategies that you want to put in place?
3 What are the commitments that your team
4 members are going to make to make sure that
5 you're reevaluating and making sure that
6 you're staying on track or being accountable
7 to some of the commitments. This is one area
8 that is really important with team success.

9 Many times our agency spends enormous
10 amounts of time building wonderful plans,
11 wonderful practices. I mean, the best
12 written agreements ever. But there's no
13 tangible to help people to come back and
14 reevaluate. So when you're doing this
15 process, it's important to narrow it down for
16 them. Say, okay. In 30 days, is that the
17 beginning? Is that a -- is 30 days a good
18 time for us to come back and revisit and see
19 what's going on? In 30 days you're going
20 to -- what is it that you're going to have
21 done in 30 days? Have them begin to
22 articulate specifically. Those people who

1 have committed to do a particular piece or if
2 it's the manager who has agreed to bring in a
3 coach for the group has agreed to do such
4 that, make sure in 30 days that you are able
5 to measure and come back and revisit that.
6 It helps when the teams are really pushing
7 for some really optimistic goals that they do
8 come back and revisit, redirect, reframe,
9 reformat. It may mean that after a period of
10 time they have to come back and fine-tune
11 some of their strategies and agreements. It
12 doesn't mean that they have failed or that it
13 didn't work. It just means that it's working
14 so well that they have recognized that this
15 document or this agreement that they've made
16 is living and breathing, and they have to
17 come back and revisit. I had someone send me
18 an e-mail this morning and said that the MOU
19 that we wrote did work. I was like, first of
20 all, I said it's a draft MOU. I was like,
21 okay. My little meager understanding of
22 draft means that it's flexible, and we can

1 change it at any time. Two, what is it --
2 how do you want it to work? Well, I need
3 this, that, and the another. Okay. How are
4 you going to introduce these changes to your
5 team to see if everyone is aware and see if
6 other people are feeling the same way. So
7 many times it looks at how you can provide
8 additional support and resources. Many times
9 when a group gets to the end, it may be a
10 good idea just to recommend something. If
11 you are familiar, it may be a good idea for
12 you-all to have another briefing. It may be
13 a good idea for the team to bring in a coach
14 to help continue with some of the decisions
15 and strategies that you have worked with. It
16 may be a good idea to have training. Let's
17 bring someone in to do more training. So you
18 look at how you can help them to continue to
19 be successful. I listed some of the
20 references that I used for this presentation
21 that I felt would be very helpful. The
22 Harvard Business School is one that just has

1 a wealth of instruments and books to -- that
2 are very useful when we're looking at
3 building teams and helping people communicate
4 and become more cohesive. I used some
5 examples from appreciate inquiry and some of
6 the appreciative team-building. Again, these
7 are great books with questions. You'll find
8 that when you work with your group it's about
9 those questions. If you have a set of
10 powerful, probing, thought-provoking
11 questions that you provide to them whether
12 you prepared them to present them
13 individually in individual sessions or you
14 look at when you bring them together to leave
15 them something to think with, they'll take
16 it. The energy from the group will take it
17 from there to begin to have a discussion that
18 they need who have. So those are just two.

19 Again, I talk about facilitating with
20 ease. How many of you are familiar with
21 overcoming the five dysfunctions as a team.
22 That is another -- Patrick Lencioni has a

1 wealth of books when it comes to working with
2 people and dealing with difficult situations
3 and conflict. I always think it is a good
4 reason. He has a workbook. There is a
5 workbook that goes along with book that
6 actually from A to Z, for someone who is
7 beginning to work more with teams that are
8 having some difficulties, it actually lays
9 out exactly what you need to do. Again, I'm
10 sure there are other materials that are very
11 good in this arena, but these are the ones
12 that we have found to be very useful. There
13 is a Web site, OD -- Organizational
14 Development, OD dot net. I'll need to
15 confirm this. But Organizational
16 Development, the community typically also has
17 a lot of great resources that you can
18 utilize. A lot of these resources just help
19 you to have conversations, help you with your
20 questioning, to help you to formulate these
21 type of interventions that you also may find
22 very useful. If you have an OD component in

1 your offices, they may be very good to
2 consult with to help you, again, to develop
3 some of these strategies.

4 These are just a few that I have
5 used. I feel as though I've done a lot of
6 talking. I raced through a lot of
7 information very quickly. But hopefully when
8 you look at your materials you can see that
9 from the beginning, one of the things that
10 are most important is that just know your
11 audience. Know your audience. Are you
12 working with a group, are you working with a
13 team? What are some of the prework and the
14 questions that you need to develop so that
15 you can be better prepared. What are some of
16 the facilitation tools that you need to have
17 in your toolbox so that when you're beginning
18 to formulate an agenda that you can make sure
19 that you have ready and available. What risk
20 are you going to take? Surely some of things
21 you are you not familiar with. Are you going
22 to take a risk and put it out there and see

1 what happens, see how the group rides in.
2 But that's how you grow with the risk. Look
3 at some of the instruments that'll help the
4 team have insights. One of the benefit of
5 some of these insights, it helps you, too.
6 Some of these instruments you can begin to
7 get an idea of what groups you're dealing
8 with. You know, when I began when I talked
9 about the DISC, you know, you can find out if
10 you have a group of high D's or high I's or
11 high S's or high C's. You know for those of
12 you who are unfamiliar with this, you know,
13 it's talking about the dominants or how --
14 are these groups task-oriented or
15 people-oriented? Again, it helps you to help
16 them. So just begin to look at some of those
17 tools that help you bring the conversations
18 together so that your group can have the
19 meetings that they need to have so they can
20 leave with saying at least I got a start. I
21 felt safe enough to say what I had to say and
22 get it off my chest and look at how we can be

1 more productive. This is just the beginning
2 of having that conversation. Questions?

3 AUDIENCE MEMBER: Hello. My name is
4 Charles Dunagan. I'm an arbitrator and
5 mediator, also a lawyer. Could you just tell
6 us a bit about the five dysfunctions of the
7 team and overcoming this in a nutshell,
8 please? Thank you.

9 CHERYL CALDWELL: When we talk about the
10 five dysfunctions of a team, and I don't want
11 to give too much information, but primarily
12 you're talking about little elements that you
13 need to be aware of in a team. It may be
14 dealing with the communication. It may be
15 dealing with mission, envision and goals.
16 Are we all on the same sheet of music when it
17 comes to our vision, mission and goals?
18 Maybe just talking about something as simple
19 about how we're going to make decisions in
20 our operating processes. What are those
21 operations? What are those processes? And
22 Patrick Lencioni, I may not be using the

1 exact terminology because that's one thing --
2 I meant to bring all my materials with me but
3 I chose to Metro and didn't. But it gives
4 you a real idea of checkpoints that you can
5 check to see if these are areas that you may
6 be deficit in as far as a team. And then
7 look at strategies of how to build. If
8 communication is an issue, look at how you
9 can build to be more effective in your
10 communication strategy. So it's a really
11 good workbook and work plan to help engage
12 your team in that way.

13 AUDIENCE MEMBER: Cheryl, how large of a
14 group do you usually work with? Also, how do
15 you determine which assessment tool that you
16 want to use for your group?

17 CHERYL CALDWELL: I typically -- we have
18 worked with groups as small as five to
19 working with entire science centers where
20 there will be 60 or more. When we work with
21 the larger groups, it's real important to
22 have your team of facilitators together.

1 We'll have at least four of us: two maybe in
2 Conflict Management; we'll have two for
3 Organizational Development. We'll work
4 together to see what is the best format.
5 When it comes to uses of tools and skills, a
6 lot of that information we get from the
7 client, the person who invited us to the
8 meeting to find out what is it that they're
9 looking for, what is it that they need? If
10 it's a group that is maybe newly forming and
11 they just want to know what strategies would
12 be best for them, then we'll look at maybe
13 something like a team-effectiveness profile,
14 which again talks about mission, goals and
15 vision. Or it helps them define their roles
16 and responsibilities, you know, to have
17 clarity in their interpersonal and team
18 relationships. So we look at, first, finding
19 out what the primary objectives are of the
20 client, listening to some of the energies of
21 the group, of what their interests are, is it
22 communication? And usually communication, I

1 have to tell you, is one of those number one
2 issues. We don't communicate. I don't
3 understand. I go to a meeting. I just give
4 them the bottom line, and they want all these
5 details. When you hear clues like that, it
6 tells you I might want to use this particular
7 instrument so you can help them have more
8 insight about why somebody may be more
9 detail-oriented and someone else may need the
10 big picture and how they can best communicate
11 with each other.

12 AUDIENCE MEMBER: Cheryl, I have a
13 question. I think this distinction between
14 teams and groups is a good one. Actually, I
15 think there are a lot more groups in the
16 agency I work with than teams. I think it's
17 a terminology question, too. People say I
18 want team-building, but they really don't
19 know -- that definition means a lot of
20 different things. What I've experienced is
21 there's a lot of -- sometimes the quality of
22 the manager is an issue. So something like

1 communication -- you don't want to put
2 anybody on the defensive but that may be
3 surfacing. We have no idea what we're
4 supposed to be doing. Or we didn't know
5 about that. We have no idea what they're
6 doing over there. It's our manager's
7 responsibility. Do you have any idea about
8 how to tackle that, have the team or the
9 group members take ownership of what they can
10 and also somehow, without putting the person
11 on the defensive, let the manager know that
12 more may be required or something different
13 may be needed here as far as what's being
14 surfaced by the team.

15 CHERYL CALDWELL: And yet, that's
16 something that's very delicate. If the
17 manager is a part of the meeting, it helps
18 tremendously. Because by them being a part
19 of the meeting and us being able to set it up
20 so that those questions and conversations can
21 surface, it helps them hear it firsthand
22 about the importance of what they need.

1 There's different ways of talking about
2 roles, responsibilities, expectations.
3 Encouraging those types of conversations, it
4 allows everybody to be on the same place. It
5 doesn't put anyone on the hot seat. But yet,
6 still those who need to hear what's important
7 are put in a position where they can hear it.
8 When we look at building strategies, you also
9 include that in the strategy of the
10 accountable piece. Who would be the person
11 that would take charge of this? Of course,
12 the manager would say, well, it would be me.
13 What is it that you need to help you be
14 successful? What is it that you, you know,
15 what do you need to help move this forward?
16 Sometimes there's managers who, you
17 know, they're in the position. They're
18 really not equipped to be managers. It may
19 be a good idea of one-on-one to offer
20 coaching. Let's look at how, you know,
21 executive coaching, managerial coaching has
22 become a really positive tool and resource in

1 the workforce. See if they can, you know,
2 partner up with someone to help them to be
3 accountable to what they really want to
4 outcome.

5 AUDIENCE MEMBER: Cheryl, I just want to
6 piggyback on what Stephanie was saying. I
7 just want to ask you, if you use anything
8 like leadership transition, something like
9 that with your teams when you do find that
10 the manager may be the biggest source of the
11 problem or something.

12 And let's see, I wanted to ask you
13 something else. Does it matter on your
14 design of your team-building, whatever you're
15 going to do, the intervention, where the
16 request came from. If it came from within a
17 team member -- one of the team members or if
18 it came from upper management, does that
19 matter how you design the intervention?

20 CHERYL CALDWELL: Yes and no. It
21 depends on how it is presented to us. If a
22 team member would approach us and wanted to

1 have some type of intervention or
2 team-building to come to their session, we
3 would have to encourage them to take that
4 back to their group to see if it's something
5 that the group will buy into or the team will
6 buy into. It's very difficult for us to say
7 okay. Well, you invited us. We're going on
8 in to have a meeting. We encourage them if
9 they're in a position to set up those initial
10 meetings to set it up. If they have that
11 type of autonomy or authority within the team
12 that they can do something of that nature to
13 do that. Once we get the groups together,
14 the format is based on the needs of the team
15 or the group. It's strictly designed based
16 on what everyone is providing us as important
17 to them.

18 In reference to the leadership -- you
19 said leadership transition, can you tell me a
20 little bit more of what you're referring to?

21 AUDIENCE MEMBER: I guess that -- well,
22 especially -- well, I'm from the Department

1 of Agriculture, and we're very political, of
2 course. There's been a lot of transitioning
3 in with the new administration with new
4 leaders. Even before that, we had a lot of
5 baby boomers retiring; and we have new
6 managers. Some of them, of course, are not
7 equipped, you know, to lead the team.

8 Basically, what I'm having is a lot
9 of groups that refuse, basically, to work
10 with the managers. They make it difficult
11 for them. I know that some agencies within
12 agriculture use leadership transition to help
13 the groups, the teams, become familiar with
14 the management style of the new manager. And
15 also they probably incorporate the executive
16 coaching in for the manager to help him lead
17 the team better. I'm just wondering if you
18 had a program, a leadership transition
19 program that you use or something like that.

20 CHERYL CALDWELL: We are a part of Human
21 Capital. Within Human Capital, we have what
22 we call the Office of Organizational Employee

1 Development. What we do is -- the best that
2 we can is to network. If we're with a group
3 and it's very clear that transitional issues
4 may be present or that we're dealing with,
5 you know, some generational differences -- as
6 you-all know we're now in a workforce where
7 we're actually living those books that have
8 been written where you have the millennials
9 coming in and telling us, oh, you don't know
10 what you're doing. But we work very closely
11 with those skills and expertise to bring them
12 into the fold when we're planning and dealing
13 with a group to make sure that it is being
14 tailored to meet the needs of the group. If
15 it is leadership transition, they're getting
16 a little taste of what that entity brings to
17 the table, and, hopefully, again, when you go
18 to the end of the session where there is a
19 need to make recommendations and further
20 suggestions, it's a good time. Most people
21 are more amenable to hearing suggestions
22 towards the end of that session, you know.

1 So that's some of the things that we
2 have done. We partner with some existing
3 services that seem to meet that need.

4 AUDIENCE MEMBER: Hi. My name is
5 Jennifer Johnson. I'm with the Coast Guard.
6 I have a question. How do you approach teams
7 that have potentially conflicting cultures,
8 such as the military versus civilian
9 cultures, such as we would have in the Coast
10 Guard.

11 CHERYL CALDWELL: That's a good
12 question. I will probably need some energy
13 from this group to help me address that
14 question because I don't think there is any
15 one way. I would probably -- if I had to
16 think on my feet right now, I think first it
17 would be important for the facilitator to be
18 familiar with both cultures and what they
19 bring to the table. What's most important to
20 them? I think it would be important to look
21 at how to common-ize the language.

22 We work with a diverse culture as

1 well in the GS. We have the geologists and
2 the biologists and the techies. When you
3 bring people together, it's real important
4 that they are clear on the language. I
5 think, too, it's important to focus on what
6 the outcomes would be, what it is that you
7 want. You're bringing us together for a
8 reason. What is that reason? Which is the
9 big picture here. Then begin to help them
10 develop strategies.

11 When I talk about appreciative
12 inquiry, one of the training aids that they
13 talked about was a joint military project
14 where they brought people in from all
15 branches of the military, all ranks. And you
16 know in the military, rank is very important.
17 They common-ized them by everybody wore --
18 wear your jeans. Be comfortable. Let's
19 focus on what's most important. Let's focus
20 on what this mission is, what the task is.

21 So maybe I'm not sure how welcoming
22 that would be in some agencies. I'm prior

1 military experience, I don't know how
2 welcoming it would be; however, if you can
3 get people to say okay, this is what we're
4 going to do. We're all going to be the same.
5 We're going to look at how we're going to,
6 you know, address whatever the mission is and
7 maybe a beginning.

8 I'm curious. For those of you who
9 work with teams, what would you suggest?
10 That's a great question.

11 AUDIENCE MEMBER: I haven't really done
12 this, but it strikes me that it sounds like
13 what's needed is almost something like
14 Myers-Briggs for organizations so that you
15 can learn to appreciate, you know, what each
16 different work culture brings to the task at
17 hand, and you know, how they can help and
18 what you need to be aware of.

19 CHERYL CALDWELL: Excellent. Using an
20 instrument like Myers-Briggs. Myers-Briggs
21 does have a format where they can go do the
22 team picture together. They'll do an

1 individual assessment so the individual will
2 know. But they have it now with technology
3 where they'll compile the team results and be
4 able to let the team know their strengths,
5 their areas that need to be improved, as
6 well. That's an excellent one. I'd love to
7 know what the outcome is. We can bring them
8 together. Is it a small group?

9 AUDIENCE MEMBER: The groups are
10 dynamic. They change depending on what the
11 issues are.

12 CHERYL CALDWELL: That's a challenge
13 right there when you have people who
14 are constantly -- you have some people that
15 are constant, then you have new people that
16 are coming in. How do you keep the
17 continuity or do you keep the continuity.
18 That may be a question for whoever is the
19 leader of the group. Do we need to break,
20 you know, when we have finished with this
21 particular topic and task because different
22 people are going to come into the fold? Do

1 we end it here? It's more of what they call
2 a -- what is that called a pet team? Just a
3 small purpose-oriented group when the mission
4 or vision is done, when they finish their
5 project, they move on to something else.
6 That may be something to consider for that
7 format. That's very interesting. I'm sure
8 there are people on the line that have a lot
9 of feedback for you as well. Yes.

10 AUDIENCE MEMBER: Hi. It just occurred
11 to me that perhaps you might do some role
12 reversal so that people could put themselves
13 in the other person's shoes to some extent.
14 In other words, the managers kind of play the
15 role of the subordinates and vice versa. It
16 might be worth trying.

17 CHERYL CALDWELL: Oh, excellent. I
18 think there's a lot of insights when you have
19 people walk in someone else's shoes. When
20 they look at what they really have faced to
21 deal with and what those challenges are. We
22 have seen where that does work very

1 effectively. So that's excellent. Very much
2 so. Any other questions or comments?

3 I just want to thank you all for the
4 invitation. Thank you very much for your
5 time. What I have here is just some contact
6 information. I'm going to really invite you,
7 if you have information in reference to
8 successes with teams that you have used,
9 maybe of some tools, some products, some
10 information that you're aware of, to please
11 e-mail me. This is my information up at the
12 top.

13 For those of you that are listening
14 on the line, I invite you to do that as well.
15 What I'm going to do is try to put some of
16 this information together and share it. The
17 more tools, more resources, more information
18 you have, the better. That's one of the
19 things that we have found out to be very
20 valuable. These are -- my colleague and I,
21 we both work with teams. She's in the
22 Norcross, Georgia, area. One of the places

1 that you can find a lot of great information
2 is through the Department of Interior.
3 That's who has sponsored us. That's who has
4 provided us the resources so that we can be
5 successful when we look at conflict
6 management and engagement. They have a Web
7 site that if you're not familiar with it, you
8 can familiarize yourself with. That will
9 probably give you even more resources when it
10 comes to conflict management, environmental
11 conflict resolution, public policy, et
12 cetera. A great staff of knowledgeable folks
13 at the Department of Interior.

14 If any questions should come up that
15 you want to ask me, I'll be available for the
16 next few minutes. I know for those of you on
17 the phone I'm finishing up a little early so
18 go grab some lunch. Thank you very much.

19 STEPHANIE: Thank you, Cheryl. I have a
20 question if you wouldn't mind. Would you
21 maybe give us a case study or an example of
22 some intervention you developed and what

1 happened to the group?

2 CHERYL CALDWELL: I can, definitely. I
3 would gladly do that. For those of you who
4 are able to stay, I will gladly share with
5 you one of the cases that we're preparing
6 for. We have -- this one basically came from
7 assessment. It was an assessment that we
8 allowed organizations to take to give us
9 feedback of how the organization is doing,
10 what's working well, what areas are
11 difficult. One of the things where this
12 particular manager was important is, how do
13 you take some of the comments from their
14 region and make it more applicable and
15 tangible to work? One of the things that we
16 did was basically is some of the strategy
17 that we shared with you. We met with the
18 client, which was the manager. We found out
19 what some of the important interests were.
20 What were some of things that they were
21 seeing. They were very concerned because
22 some of the comments on this organizational

1 survey that went through everybody, I mean,
2 the director, everybody saw it, just showed
3 real negativity on their part. But there was
4 no real clear particulars. They really
5 didn't know, well, what is truly going on?
6 Because I'm not hearing it. I don't know.
7 People just seem to be very satisfied.

8 So what they did, they took the risk
9 in allowing us to come in there. And so
10 first finding out what was most important to
11 the client, the manager. Then allowing us to
12 be able to go in and have those individual
13 meetings with that entire staff. And what we
14 did to prepare for that, we had some fixed
15 questions that we went in there with so we
16 had some uniformity. And we spoke with each
17 individual but also left it open enough so if
18 there were other concerns or other
19 frustrations, we were able to hear it. And
20 based on -- after we met with about 60
21 people, after meeting with everyone, we were
22 able to find out what those common themes

1 were. And in preparing for those individual
2 meetings, we let everyone know that this was
3 confidential. However, we were going to look
4 for those common themes. And the common
5 themes that everybody seemed to be saying or
6 where there was more than one person so no
7 one person would be identified, those are the
8 issues that we were going to present and look
9 at building strategies to help them move
10 forward on.

11 So when we went back to the manager
12 or client to share what these common themes
13 were, it was much more palpable. I mean, it
14 kind of goes with the question you asked, you
15 know, what happens if the manager is the
16 problem? Here there were instances where the
17 manager could use some support. But the only
18 way they could use some support, they had to
19 know what the need was. And so we were able
20 to set it up in a way that they could find
21 out what that need was. After that we began
22 to have more focus groups. We brought

1 everybody together. And based on some of the
2 common themes, we each gave them a topic and
3 a facilitator to help them to have those
4 conversations of what each of these
5 particulars were needed. One of the things
6 that was real important is, you know, using
7 some of the flexibilities, you know, some of
8 the flexibilities the work force has as far
9 as flexible work environment, flexible
10 scheduling. For whatever reason, this was a
11 real important piece for this particular
12 group because the demand of their work was
13 high. They were required to work weekends,
14 evenings, holidays, long hours, you know, to
15 go out into the field and do samples. They
16 were trying to grasp for something to help
17 make the work environment a little bit more
18 productive. And because that hadn't been
19 afforded to them, they were feeling more
20 robotic in their processes, the morale went
21 down and it was reflected on the survey.

22 So basically, what we did was asked

1 them the questions of, what is the outcome?
2 What do you want? How do we make this work?
3 It's going through that old standard. You
4 know, instead of giving me a problem, give me
5 some solutions. Put it in more of a
6 problem/solution format based on visioning,
7 what works well, what resources did you need.
8 They were able to come up with some clear
9 tangibles.

10 Now, there were about four to five
11 issues, so we were able to do this project
12 with each one of these issues so they were
13 actually able to have again tangibles. Then
14 we went back to help them to make these
15 tangibles very concrete. What are the
16 resources? What do you need? How are you
17 going to make it happen? How are you going
18 to evaluate your processes? The same things
19 that we shared -- that I shared with you here
20 today, we were able to do that. And I have
21 to say that what worked well were they were
22 able to complete three of their tangibles.

1 And it was difficult. They had to go back.
2 They had to revisit. One of my colleagues
3 had to go and continue to do more team
4 coaching to help them to work through some of
5 the difficulties. But that was one area that
6 made success. Instead of, you know, you go
7 in, you do your thing and then you leave, to
8 look at how to kind of continue to keep
9 yourself invited or have some kind of network
10 there invited for them so they don't fail.
11 So we begin to work with them in that, you
12 know, more individual capacity. When we
13 brought them back together again, we began to
14 hear them build. Where you could just hear
15 it in their tone and the way they engaged
16 each other that there has been some
17 understanding and growth in the process to
18 help them move forward. So I think one of
19 the things that's real important to realize
20 is, as facilitators as well as members of the
21 team, nothing happens automatic. It really
22 is a process. And to be able to, you know,

1 facilitate each stage of the process really
2 helps with the success. And preparing the
3 teams for when they're disappointed, where
4 things don't go quite the way they want, how
5 they can re-engage and revisit to make it
6 successful. And I think that's one of the
7 big pieces. And that's what we were able to
8 do for this group.

9 Right now they've had setbacks. They
10 have had setbacks where, you know, it's like,
11 we've gone back into our cabinets and we're
12 doing things the way we used to. But because
13 of the engagement with their guiding
14 principles, because of some of the
15 commitments they've put in writing and how
16 they're going to come back and revisit, they
17 do have that personal integrity that brings
18 them back to revisit it and to see what they
19 need? What resources? What tools? What do
20 they need to help them move toward?

21 In some cases, maybe a year later, we
22 may be re-invited to do it. I think that's

1 also a difference with our agency. We have a
2 staff who actually can go back and do some of
3 these things. I know some agencies people
4 are collateral-duty so it's not as easy. But
5 we look at how we can share resources. If
6 there is a way that we can coach you through
7 a process or help you develop a process, we
8 will gladly do that, as well as referring you
9 to some other experts from other areas to
10 help you move through.

11 But that's how we begin to have that
12 conversation with a group. We were able to
13 fortunately see outcomes. So we recognize
14 the struggles that they made, then help them
15 be able to recommit to some of the goals that
16 they've put in place. It's ever-evolving.
17 It's ever-moving. It's fluid. And letting
18 them know that right off the bat really helps
19 them to be successful.

20 STEPHANIE: Once again, thank you.
21 Thank you very much.

22 * * * * *

1 CERTIFICATE OF NOTARY PUBLIC

2 STATE OF FLORIDA

3 I, Janet L. Clark, FPR, a Notary Public
4 in and for the State of Florida, do hereby
5 certify that the foregoing transcript was
6 transcribed by me from a prerecorded audio to the
7 best of my ability; that I am neither counsel
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9 the action; and further, that I am not a relative
10 or employee of any counsel or attorney employed
11 by the parties hereto, nor financially or
12 otherwise interested in the outcome of the
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22 December 5, 2008